



# Creating Scenarios and Finalizing Awards

## OVERVIEW

The goal of this task is to create scenarios and finalize awards in Sourcing Director. Vendor responses can be viewed, evaluated and awarded only after the event **Close Date** passes, and the event has moved to *Evaluation* status.

A user must have specific permissions to create award scenarios and finalize awards. The sourcing event itself must be in *Under Evaluation* status.

After an award has been finalized, the award information moves into Evaluation Workflow to be reviewed and approved by other evaluation users who review the evaluation information to ensure the award is made to the appropriate vendor response.

*If you have questions, contact the State Procurement Bureau for more information.*

## CREATING SCENARIOS

1. Navigate to **Sourcing > Solicitations > Solicitations Dashboard**.
2. From the **Solicitations Dashboard**, click the **Under Evaluation** link to find events in that status.
3. Click on the name of the event in which you want to create scenarios.
4. The **Vendor Response** page displays. Use this page to reference which suppliers have submitted bids, as well as their **Total Bid** price. Any supplier who has submitted bids will be eligible to be included in the Scenario Evaluation.
5. Click the **Evaluation Actions** drop-down menu.
  - Select **Evaluate All Responses** to include all responses for this sourcing event.
  - Optionally, use the checkboxes on the right side of the screen to select desired vendors, then select **Evaluate Selected Responses** from this menu.
6. Use the **View Scenario** drop-down menu to toggle between scenarios.
  - View a split award scenario, single award scenario, or load a previously saved scenario.
  - After making a selection, the scenario will generate and the appropriate vendors will be assigned the *Pending Award* status.

7. Each scenario can be customized by using the **Scenario Award Actions** drop-down menu.
  - Select which items in the scenario you'd like to make an award action on.
  - Click the **Scenario Awards** action menu to choose which vendor to award the selected items.
  - Repeat to assign awards as needed.
8. Use the **Response Notes** fields to include comments about each supplier or the reasoning behind the award decisions.
9. Once the scenario is completely decided, use the **Scenario Breakdown** tab to view more details about the items awarded.
10. Click **Save As** to save your scenario for evaluation in the future. It can be loaded again by clicking **Load Saved Scenario** from the **View Scenario** drop-down menu.
11. Click the **Export** drop-down menu to export the results to an Excel sheet. Select either **Export All Responses** or **Export this Scenario** as appropriate.

## FINALIZING AWARDS

1. When ready to finalize the Pending Awards of a scenario, click the **Finalize Awards** button at the top of the screen.
2. If the scenario was not previously saved, enter a **Scenario Name** for the Finalized Award and provide **Notes** regarding the decision.
3. Click **Save and Finalize** to award the scenario to the selected vendors.
  - The award information will now move along to approvers reviewing the evaluation in Evaluation Workflow.
  - Once the award has been finalized, the event will move from *Under Evaluation* to *Awarded* on the **Solicitations Dashboard**.
4. If there has been a mistake in the award decision, click the **Remove Finalized Award** button to retract the awarded scenario.